

## **Exhibit F**



**FOSTER BREVER WEHRLY, PLLC**  
ATTORNEYS AT LAW

ROBERT J. FOSTER (612) 787-7894  
THOMAS E. BREVER (612) 787-7893  
ANDREW T. BREVER (612) 455-8942  
JOHN A. WEHRLY (612) 455-8944  
OF COUNSEL, ERIC B. BREVER (612) 787-7891

December 20, 2016

RECEIVED  
2016 JAN 21 A 9:39  
U.S. ATTORNEY  
DIST. OF MINN.

Messrs David Maria, Esq.  
John Kokkinen, Esq.  
Assistant US Attorneys  
600 US Courthouse 300 South 4<sup>th</sup> Street  
Minneapolis, MN 55418

RE: Subpoena on Murry & Associates

Gentlemen:

As we discussed, I have reviewed the communications pertaining to Ed Adams and believe the following items are covered neither under attorney-client nor work product privileges:


1. Email string dated 5/23/16;
2. Email string dated 6/1/2016;
3. Email string dated 5/12/2016;
4. Email string dated 4/27/2016;
5. Email dated 4/12/2016;
6. Email string dated 5/23/2016;
7. Email dated 5/5/2016;
8. Email string dated 4/4/2016;
9. Email dated 4/5/2016;
10. Email dated 11/8/2014;
11. Emails dated 10/29/2014;
12. Email dated 10/28/2014;
13. Email dated 10/17/2014;
14. Email string dated 11/6/2014;
15. Email string dated 10/29/2014;
16. Email dated 11/6/2014;
17. Email dated 4/5/2016;
18. Email string dated 5/10/2016;
19. Email dated 4/21/16;
20. Email dated 5/16/2016;

2812 ANTHONY LANE SOUTH, SUITE 200 • ST. ANTHONY, MN 55418  
FAX: (612) 788-9879  
www.fosterbrever.com

21. Email string dated 4/7/2016;
22. Email dated 4/12/2016;
23. Email string dated 4/5/2016;
24. Email string dated 4/4/2016;
25. Email string dated 12/1/2016;
26. Email string dated 10/27/2014;
27. Email string dated 5/31/2016;
28. Email string dated 11/12/2014;
29. Email dated 5/31/2016;
30. Email dated 11/12/2014;
31. Email dated 4/27/2016.

I believe the remaining items to be privileged under the grounds earlier indicated.

Sincerely,

A handwritten signature in black ink, appearing to read 'Thomas E. Brever', written over a horizontal line.

Thomas E. Brever

Enclosures

cc: Client

**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Monday, May 23, 2016 12:00 PM  
**To:** Edward Adams  
**Subject:** RE: K-1s

Hi Ed,

If I can get everything to Pat by Wednesday, we should be able to get everything wrapped up by Friday. Would you like to come in and pick up your returns? I am out of the office all day Friday but I can check with Pat to see what his schedule is like Friday.

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

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**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, May 23, 2016 9:37 AM  
**To:** Ashley Miller  
**Subject:** Re: K-1s

Ashley,

I hope you are well.

Can we get the returns ready to file by this Friday? I wanted to get them off my list by the end of May.

Best,  
Ed

---

**From:** Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)>  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Sent:** Tuesday, May 17, 2016 10:28 AM  
**Subject:** RE: K-1s

Thanks Ed!

***Ashley Miller, CPA***

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7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)

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Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, May 16, 2016 3:11 PM  
**To:** Ashley Miller  
**Subject:** Fwd: K-1s

Ashley,

I think this is the last piece of information you require.

Please let me know where we are at with wrapping up the process.

Best,  
Ed

Sent from my iPhone

Begin forwarded message:

**From:** Brian Rogers <[brian.rogers@evenhere.com](mailto:brian.rogers@evenhere.com)>  
**Date:** May 16, 2016 at 4:08:26 PM EDT  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Subject:** Re: K-1s

Ed,

Here is your K1.

Brian

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**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Tuesday, May 17, 2016 10:29 AM  
**To:** Edward Adams  
**Subject:** RE: K-1s

Thanks Ed!

***Ashley Miller, CPA***

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Ed,

Here is your K1.

Brian

**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Monday, May 23, 2016 2:03 PM  
**To:** Edward Adams  
**Subject:** RE: Open Items

No worries. Thanks Ed! We will see you next Tuesday, May 31 at 1 PM.

***Ashley Miller, CPA***

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7575 Golden Valley, Suite 119  
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**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, May 23, 2016 2:01 PM  
**To:** Ashley Miller  
**Subject:** Re: Open Items

Yes. Sorry. I will come by around 1:00.

Sent from my iPhone

On May 23, 2016, at 2:00 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

Thanks for your quick response Ed, we will move forward. Did you see my note regarding picking up your returns. Tuesday, May 31 is the day that will work best for Pat. He would be available after 11 AM. Is there a time that would work best for you?

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Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, May 23, 2016 1:24 PM  
**To:** Ashley Miller  
**Subject:** Re: Open Items

Ashley,

My answers follow below:

1. January 30, 2015
2. 6/2/2010 for \$100,000
3. Active
4. 7/15/2014 and \$12,500
5. a. Correct  
b. Correct  
c. Correct  
d. Correct  
e. \$50,000 in 2009  
f. \$75,000 in 2011  
g. It is my law firm and I believe a 1099 was generated which you have for 2015.

Best,  
Ed

---

**From:** Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)>  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Sent:** Monday, May 23, 2016 1:03 PM  
**Subject:** Open Items

Ed,

After entering the new information you provided I scanned through our list to make there wasn't any more information we needed from you and there are a few more items to clarify:

1. After our meeting you were going to confirm the dates you made the payments to MN for your amended 2008, 2009 and 2010 returns. Here are the balances your returns showed
  - a. 2008 \$8,218
  - b. 2009 \$19,928
  - c. 2010 \$7,827
2. Can you confirm the date you purchased the Bossier Casino Holdco Inc Stock? (This is the one you sold on 5/8/15 for \$3,744.08 and said your basis was \$85,000)
3. Can you confirm your investment in Shosell, LLC is passive or active?
4. When did you purchase your 5% interest in Shosell and did you contribute any capital?
5. In our meeting, you had discussed the following in regards to your initial investments into each of these entities and I just want to make sure we have the right numbers as some of these. I think you were also going to check if your previous accountant had any basis calculations for your investments in these entities as that would be the best option. If he does not, we can work with what we have. Some of these investments you have had for a while may require a bit more digging in the future as we would want to make sure we had the correct basis number in the event of a sale.
  - a. Foodsby - 2014 Investment for \$75,000
  - b. Z & H Hospitality – Ed 2014 Investment for \$75,000 (Ownership in this entity appears to be equal with Denise share) This also seems pretty high considering the capital account balance on the K-1 and you did report some activity in this entity in 2013



- c. Z & H Hospitality – Denise 2014 Investment for \$125,000 (Ownership in this entity appears to be equal with Ed share) This also seems pretty high considering the capital account balance on the K-1 and you did some activity in this entity in 2013
- d. Devenir Group – 2010 or 2011 Investment for \$350,000 (This also seems high considering the value of the capital account
- e. Magni Asset Management – Please provide year invested and any amounts contributed
- f. Yogurt Lab Holdings LLC – Please provide year invested and any amounts contributed
- g. Adams Grumbles LLP – It looks like you had activity in this entity reported on your 2008 return. Did you contribute anything or receive any distributions from this entity over the years?

I think that should be it. If you could get back to me at your earliest convenience it would be greatly appreciated!

I checked with Pat and Tuesday, May 31 after 11 AM would work best for him. Is there a time that works best for you to stop in that day?

***Ashley Miller, CPA***

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**Ariel Scott**

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**From:** Ashley Miller  
**Sent:** Monday, May 23, 2016 2:00 PM  
**To:** Edward Adams  
**Subject:** RE: Open Items

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  - a. Correct
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  - d. Correct
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**Ariel Scott**

**From:** Ashley Miller  
**Sent:** Wednesday, June 01, 2016 12:53 PM  
**To:** Patrick M. Murry  
**Subject:** RE: Meeting Yesterday

Pat,

Here is what I have drafted for Ed. Do you have anything that you would like to add? With his question on Linnise, I don't believe it would be worthwhile to amend the return. Could we just adjust the basis loss carryforward in his 2016 return and include a statement?

**Ashley Miller, CPA**

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Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Wednesday, June 01, 2016 10:24 AM  
**To:** Patrick M. Murry; Ashley Miller  
**Subject:** Meeting Yesterday

Pat/Ashley,

Thanks for your time yesterday and your work on my taxes.

I mailed the Consent to File form today back to you and the checks to the relevant payors.

Three questions we wanted to circle back on:

1) Losses for Linnise in 2013 per the revised return I provided;

You do not have basis to deduct losses in Linnise Corporation, therefore the increased loss would only increase the basis loss carryforward and would not increase the amount eligible to be deducted.

2) 529 Plan treatment (if unused); and

Qualified Tuition Program (QTP) funds can be distributed from one QTP to another set up for the benefit of the same beneficiary or a member of the beneficiary's family. For this purpose family would include a son or daughter of the beneficiary.

3) Sales of stock owned more than five years acquired on August 3, 2011 and capital gains treatment with respect thereof.

The exclusion for sales of Qualified Small Business Stock acquired after September 27, 2010 and held for more than 5 years is 100% and the AMT preference addback is eliminated

Ed

**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Thursday, May 12, 2016 7:46 AM  
**To:** Edward Adams  
**Subject:** RE: Progress Update

Sounds great Ed! Thank you for the update!

***Ashley Miller, CPA***

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**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Thursday, May 12, 2016 6:57 AM  
**To:** Ashley Miller  
**Subject:** Re: Progress Update

I am working on your list and should have all your answers by Monday at the latest.

Sent from my iPhone

On May 6, 2016, at 1:23 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

Hi Ed,

I would be available after 10 AM. Would that work for you?

Ashley Miller, CPA  
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On May 6, 2016, at 7:21 AM, Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)> wrote:

Ashley,

Thanks for the message. I am sorry things have been so crazy on your end.

Can we meet on Tuesday morning of next week?

Ed

Sent from my iPhone

On May 5, 2016, at 8:44 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

Hi Ed,

I hope all is well. I wanted to touch base on the progress of your return. I have gotten about ¾ through your return have a list of items to discuss. I have blocked time on my schedule on Monday to get through the rest the rest of your return. This week turned to be more chaotic than anticipated. Would you like to set up a time to stop in and review those questions in person or would you prefer to discuss them in a phone call or email?

Have a great weekend and I will touch base with you early next week.

***Ashley Miller, CPA***

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**Ariel Scott**

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**From:** Ashley Miller  
**Sent:** Friday, May 06, 2016 1:24 PM  
**To:** Edward Adams  
**Subject:** Re: Progress Update

Hi Ed,

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Ashley Miller, CPA  
Murry & Associates, LLC  
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Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
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**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Wednesday, April 27, 2016 12:01 PM  
**To:** Edward Adams; Patrick M. Murry  
**Subject:** RE: Tax Returns

Hi Ed,

Thanks for checking in. We have not completed your return yet but we hope to reach a point early next week when we can touch base and tie up any loose ends. I will keep you posted on our progress.

Thanks and have a great day!

***Ashley Miller, CPA***

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Phone: (763) 450-5443  
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Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Wednesday, April 27, 2016 11:52 AM  
**To:** Ashley Miller; Patrick M. Murry  
**Subject:** Tax Returns

Ashley/Pat,

Where are we at? Any progress?

Ed

**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Tuesday, April 12, 2016 9:30 AM  
**To:** Megan Buck  
**Subject:** Additional emails from Ed Adams  
**Attachments:** K-1 for E. Adams; Another K-1; Fwd: Yogurt Lab 2015 K1; Re: Additional K-1s; Additional K-1s

Meg,

Can you check to see that we have accounted for these in Ed Adams return? He believes he sent me his last missing piece.

***Ashley Miller, CPA***

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**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Monday, May 23, 2016 10:23 AM  
**To:** Patrick M. Murry  
**Subject:** FW: K-1s

Do you think this is doable in your schedule?

***Ashley Miller, CPA***

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**Sent:** Monday, May 23, 2016 9:37 AM  
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**Subject:** Re: K-1s

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Best,  
Ed

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**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Sent:** Tuesday, May 17, 2016 10:28 AM  
**Subject:** RE: K-1s

Thanks Ed!

***Ashley Miller, CPA***

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**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, May 16, 2016 3:11 PM  
**To:** Ashley Miller  
**Subject:** Fwd: K-1s

Ashley,

I think this is the last piece of information you require.

Please let me know where we are at with wrapping up the process.

Best,  
Ed

Sent from my iPhone

Begin forwarded message:

**From:** Brian Rogers <[brian.rogers@evenhere.com](mailto:brian.rogers@evenhere.com)>  
**Date:** May 16, 2016 at 4:08:26 PM EDT  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Subject:** Re: K-1s

Ed,

Here is your K1.

Brian

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**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Tuesday, May 17, 2016 10:20 AM  
**To:** Megan Buck  
**Subject:** Ed Adams  
**Attachments:** Re: Progress Update; Fwd: K-1s

Here is the last of the Ed Adams information I believe!

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Thursday, May 05, 2016 8:44 PM  
**To:** Edward Adams  
**Subject:** Progress Update

Hi Ed,

I hope all is well. I wanted to touch base on the progress of your return. I have gotten about ¾ through your return have a list of items to discuss. I have blocked time on my schedule on Monday to get through the rest the rest of your return. This week turned to be more chaotic than anticipated. Would you like to set up a time to stop in and review those questions in person or would you prefer to discuss them in a phone call or email?

Have a great weekend and I will touch base with you early next week.

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)



**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Monday, April 04, 2016 1:10 PM  
**To:** Edward Adams  
**Subject:** RE: Checking In

I think we can work with what we have for that one. The one we needed the most was the AMEX file.

Thank you!

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, April 04, 2016 1:07 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Sorry. I do not believe I saved that file correctly. The entries are relatively few, however.

**From:** Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)>  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Sent:** Monday, April 4, 2016 1:01 PM  
**Subject:** RE: Checking In

Thanks Ed,

It was nice meeting with you today. It looks like the WF checking transactions you sent are for 2016. Do you happen to have the spreadsheet for 2015?

Thanks and have a great day!

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, April 04, 2016 12:55 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Ashley,

Thanks for meeting today.

Attached are the spreadsheets you requested.

Best,  
Ed

---

**From:** Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)>  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Sent:** Thursday, December 3, 2015 2:12 PM  
**Subject:** RE: Checking In

Thanks Ed. Happy Holidays to you as well!

**Ashley Miller, CPA**  
Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

---

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Tuesday, December 01, 2015 6:24 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Thanks, Ashley.

I will revert.

Happy Holidays!

Sent from my iPhone

On Dec 1, 2015, at 4:29 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

Hi Ed,

I hope all is well and you were able to enjoy a nice Thanksgiving with your family. With the end of the year drawing near I thought it best to check to see if there was anything you cared to touch base on tax planning wise. The last we spoke you had mentioned

CASE 0:17-cr-00064-DWF-KMM Doc. 93-6 Filed 02/05/18 Page 27 of 61  
that your accountant was nearing retirement and that you were considering transitioning to our firm for your future tax needs. If that is still the case, please do not hesitate to contact Pat or myself with any questions that make come up leading up to the new year.

Thanks and have a great day!

**Ashley Miller, CPA**

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

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**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Monday, April 04, 2016 1:01 PM  
**To:** Edward Adams  
**Subject:** RE: Checking In

Thanks Ed,

It was nice meeting with you today. It looks like the WF checking transactions you sent are for 2016. Do you happen to have the spreadsheet for 2015?

Thanks and have a great day!

***Ashley Miller, CPA***

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7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

---

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Monday, April 04, 2016 12:55 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Ashley,

Thanks for meeting today.

Attached are the spreadsheets you requested.

Best,  
Ed

---

**From:** Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)>  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Sent:** Thursday, December 3, 2015 2:12 PM  
**Subject:** RE: Checking In

Thanks Ed. Happy Holidays to you as well!

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)

Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Tuesday, December 01, 2015 6:24 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Thanks, Ashley.

I will revert.

Happy Holidays!

Sent from my iPhone

On Dec 1, 2015, at 4:29 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

Hi Ed,

I hope all is well and you were able to enjoy a nice Thanksgiving with your family. With the end of the year drawing near I thought it best to check to see if there was anything you cared to touch base on tax planning wise. The last we spoke you had mentioned that your accountant was nearing retirement and that you were considering transitioning to our firm for your future tax needs. If that is still the case, please do not hesitate to contact Pat or myself with any questions that make come up leading up to the new year.

Thanks and have a great day!

**Ashley Miller, CPA**

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
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**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, April 05, 2016 3:13 PM  
**To:** Ashley Miller  
**Subject:** Additional K-1s  
**Attachments:** K-1 ADAMS GRUMBLES.pdf; SAR-Pride Engineering K-1.pdf

Ashley,

Attached are two additional K-1s. I am waiting on one more.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Saturday, November 08, 2014 12:45 PM  
**To:** Ashley Miller  
**Subject:** 2009 Taxes  
**Attachments:** 2009 Adams E Form 1040 Individual Tax Return.pdf; DLA Tax Return Stock Trades (2009).xls; ESA Tax Return Stock Trades (2009).xls

Ashley,

Please review the attached and let's discuss.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Wednesday, October 29, 2014 5:37 PM  
**To:** Patrick M. Murry; Ashley Miller  
**Subject:** E. Adams Amended Returns for 2007-2010  
**Attachments:** 2010 Amended Adams.pdf; 2009 Amended Adams.pdf; 2008 Amended Adams.pdf; 2007 Amended Adams.pdf

Pat/Ashley,

Attached are my amended returns.

Thanks.

Ed



**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Wednesday, October 29, 2014 6:12 AM  
**To:** Patrick M. Murry; Ashley Miller  
**Cc:** tbrever@fosterbrever.com  
**Subject:** E. Adams Amendments  
**Attachments:** ESA Tax Questions.xlsx

Pat/Ashley,

Attached is a spreadsheet that I provided yesterday to you but now revised. I am happy to discuss at your convenience. I am working on a few small pieces of loose information, but I believe it is almost complete.

Thanks.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, October 28, 2014 8:39 PM  
**To:** Patrick M. Murry  
**Cc:** Ashley Miller  
**Subject:** E. Adams  
**Attachments:** ESA Tax Summary for P. Murry.xlsx

Pat/Ashley,

Thanks for you time today.

Attached are the spreadsheets I promised

I will send the TEDA information separately.

Please let me know what else you require as soon as possible so we can resolve and file.

All the best,  
Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Monday, October 17, 2016 11:06 AM  
**To:** Ashley Miller  
**Subject:** E and D Adams Taxes  
**Attachments:** Statement for A. Miller.pdf

Ashley,

Please call at your convenience regarding the attached.

Thanks.

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Thursday, November 06, 2014 11:49 AM  
**To:** Ashley Miller  
**Subject:** Fw: 2008 & 2009 Returns  
**Attachments:** US AMENDED IND TAX RETURN 2008.pdf, US AMENDED IND TAX RETURN 2009.pdf

Ashley,

Please confirm receipt and that this works. Thanks.

Ed

----- Forwarded Message -----

**From:** "Baltera, Katherine" <Katherine.Baltera@claconnect.com>  
**To:** Edward Adams <edwardsadams@yahoo.com>  
**Cc:** "Kiryliuk, Merv N." <Merv.Kiryliuk@claconnect.com>  
**Sent:** Thursday, November 6, 2014 11:18 AM  
**Subject:** 2008 & 2009 Returns

Ed,

Attached are the 2008 and 2009 Amended Returns; both of which contain the AMT schedules.

Both documents are password protected with the last 4 digits of your SSN. Please confirm with me once you have received these documents.



**CliftonLarsonAllen**

Katie Baltera, Client Service Assistant  
Dealerships, CliftonLarsonAllen LLP

Direct 612-397-3113  
katherine.baltera@CLAconnect.com

Main 612-376-4500 x13113, Fax 612-376-4850  
220 South Sixth Street, Suite 300, Minneapolis, MN 55402  
CLAconnect.com



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**CliftonLarsonAllen LLP**

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**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Wednesday, October 29, 2014 5:33 PM  
**To:** Patrick M. Murry; Ashley Miller  
**Subject:** Fw: Request Tax Documents  
**Attachments:** 2007 Amended Adams.pdf; 2008 Amended Adams.pdf; 2009 Amended Adams.pdf; 2010 Amended Adams.pdf; MN Rev Correspondence dated 8-24-11.pdf; MN Rev Correspondence dated 10-11-11.pdf

The password for the amended attached return is 9009. Thanks.

On Monday, October 13, 2014 5:06 PM, "Baltera, Katherine" <Katherine.Baltera@claconnect.com> wrote:

Hey Ed,

Here you go; thanks for your patience!

Give me a call (direct line below) if you have any questions or issues opening the files. (They are again password protected with the last 4 digits of your SSN).

Thanks!



**CliftonLarsonAllen**

**Katie Baltera, Client Service Assistant**

Dealerships, CliftonLarsonAllen LLP

Direct 612-397-3113

katherine.baltera@CLAconnect.com

Main 612-376-4500 x13113, Fax 612-376-4850

220 South Sixth Street, Suite 300, Minneapolis, MN 55402

CLAconnect.com



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of nexia international

**From:** Edward Adams [mailto:edwardsadams@yahoo.com]

**Sent:** Monday, October 13, 2014 7:46 AM

**To:** Baltera, Katherine

**Subject:** Re:

Katie,

Can you resend the amended returns for 2007 thru 2010? The link expired. Thanks.

Ed Adams

On Tuesday, September 23, 2014 11:27 AM, "Baltera, Katherine" <Katherine.Baltera@claconnect.com> wrote:

You're welcome.

Let me know if you need anything else sent over!

-Katie



**CliftonLarsonAllen**

**Katie Baltera, Client Service Assistant**

Dealerships, CliftonLarsonAllen LLP

Direct 612-397-3113

katherine.baltera@CLAconnect.com

Main 612-376-4500 x13113, Fax 612-376-4850

220 South Sixth Street, Suite 300, Minneapolis, MN 55402

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**From:** Edward Adams [mailto:edwardsadams@yahoo.com]

**Sent:** Tuesday, September 23, 2014 11:22 AM

**To:** Baltera, Katherine

**Subject:** Re: [2014/09/23 11:12 AM - Sent via LeapFILE] Requested Tax Documents

Thank you!!!

On Tuesday, September 23, 2014 11:13 AM, "katherine.baltera@claconnect.com" <katherine.baltera@claconnect.com> wrote:

\*\*\* You have a secure file transfer awaiting download. Details enclosed. \*\*\*

**FROM:** [katherine.baltera@claconnect.com](mailto:katherine.baltera@claconnect.com)

**TO:** [edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com) ([edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com))

**SUBJECT:** [2014/09/23 11:12 AM - Sent via LeapFILE] Requested Tax Documents

**FILE TRANSFER WAITING:**

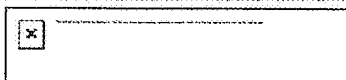
Click the secure link to download.

<http://claconnect.leapfile.net/get.jsp?t=8ae61408488738310148a3499abc3ad6>

(TRANSFER EXPIRES October 07, 2014 11:13 AM)

Hi Ed,

Attached are all the documents you requested from Merv. They are each password protected with the last 4 digits of your SSN.



**Katie Baltera, Client Service Assistant**

Dealerships, CliftonLarsonAllen LLP

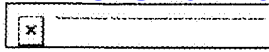
Direct 612-397-3113

katherine.baltera@CLAconnect.com

Main 612-376-4500 x13113, Fax 612-376-4850

220 South Sixth Street, Suite 300, Minneapolis, MN 55402

CLAconnect.com



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CliftonLarsonAllen LLP

**Ariel Scott**

---

**From:** edwardsadams@yahoo.com  
**Sent:** Thursday, November 06, 2014 11:43 AM  
**To:** Ashley Miller  
**Subject:** Fwd: 2008 & 2009 Returns  
**Attachments:** image004.jpg; ATT2747490.htm; image003.jpg; ATT2747491.htm; US AMENDED IND TAX RETURN 2008.pdf; ATT2747492.htm; US AMENDED IND TAX RETURN 2009.pdf; ATT2747493.htm

Ashley,

Please confirm receipt and these work...

Ed

Sent from my iPhone

Begin forwarded message:

**From:** "Baltera, Katherine" <[Katherine.Baltera@claconnect.com](mailto:Katherine.Baltera@claconnect.com)>  
**Date:** November 6, 2014 at 11:18:06 AM CST  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Cc:** "Kiryluik, Merv N." <[Merv.Kiryluik@claconnect.com](mailto:Merv.Kiryluik@claconnect.com)>  
**Subject:** 2008 & 2009 Returns

Ed,

Attached are the 2008 and 2009 Amended Returns; both of which contain the AMT schedules.

Both documents are password protected with the last 4 digits of your SSN. Please confirm with me once you have received these documents.



**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, April 05, 2016 4:55 PM  
**To:** Ashley Miller  
**Subject:** Fwd: Additional K-1s

My mistake; my son's trust owns the SAR interest.

Sent from my iPhone

Begin forwarded message:

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Date:** April 5, 2016 at 3:16:23 PM CDT  
**To:** Ashley Miller <amiller@murryllc.com>  
**Subject: Re: Additional K-1s**  
**Reply-To:** Edward Adams <edwardsadams@yahoo.com>

With respect to SAR, I own 25% of the numbers set forth therein.

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**To:** Ashley Miller <amiller@murryllc.com>  
**Sent:** Tuesday, April 5, 2016 3:13 PM  
**Subject:** Additional K-1s

Ashley,

Attached are two additional K-1s. I am waiting on one more.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams10@gmail.com>  
**Sent:** Tuesday, May 10, 2016 12:10 PM  
**To:** Ashley Miller  
**Subject:** Fwd: Information on June E. Adams Irrevocable Trust Agreement  
**Attachments:** Irrevocable Trust 07.21.14.pdf; ATT15776193.htm; QCD 07.21.14.pdf; ATT15776194.htm; Trust 07.21.14.pdf; ATT15776195.htm; Will 07.21.14.pdf; ATT15776196.htm

Sent from my iPhone

Begin forwarded message:

**From:** "Cory R. Wessman" <crwessman@cericksonlaw.com>  
**Date:** July 21, 2014 at 11:33:47 AM CDT  
**To:** "edwardsadams10@gmail.com" <edwardsadams10@gmail.com>, "patrick.morgan@ubs.com" <patrick.morgan@ubs.com>, "john.bloom@ubs.com" <john.bloom@ubs.com>  
**Subject:** Information on June E. Adams Irrevocable Trust Agreement

Dear Ed,

While it was nice to see you again today, I'm so sorry that your mother is having a difficult day. I hope that the day goes better for her. Your mother's direction to me at the beginning of our meeting that she wanted to sign was sufficient grounds for us to proceed with the planning, despite the confusion that was obvious and apparent. As John, Patrick and I discussed after your departure, while your mother may (or may not) have had sufficient legal capacity today, I see very little risk in implementing the legal planning we have been discussing, given your family's situation and the objectives you hope to achieve. Please let me know if you have any concerns in that regard.

As we discussed today, I wanted to provide everyone (including John and Patrick, whom I have copied on this email) with the information necessary to get going on asset transfers as soon as possible. Ed, upon your return from the east coast in August, perhaps we can circle back and discuss the next steps, or the questions you have unresolved at that time.

In opening accounts "into" the newly-created Irrevocable Trust, I recommend the following title: **"Edward S. Adams, as Trustee, and any successor Trustee(s), of the June E. Adams Irrevocable Trust FBO Edward Robert Adams under agreement dated July 21, 2014."** It certainly can be abbreviated, but I'd suggest that the term "Irrevocable" (or "Irr") be included in any abbreviated title. The tax identification number assigned to the irrevocable trust by the IRS is as follows: [REDACTED] **4582.**

I will be following up, by mail, with copies of the documents signed today. As we discussed during our first meeting, your mother also signed a Revocable Trust, a copy of which will be sent to everyone. For the time being, I recommend that only the residence be transferred to that trust. Our office will follow up with Hennepin County to obtain the full legal description for the residence. Ed, no further action is required by you or your mother at this time, although we can certainly circle back upon your return to discuss the proper ownership of the home in light of your mother's situation, as it unfolds.

Ed, please let me know what additional questions you have at this time. Otherwise, I wish you safe travels, and I look forward to speaking with you upon your return.

Patrick and John, please let me know how I can be of additional assistance on the asset re-titling process.

Thanks all,  
Cory

Cory R. Wessman  
Attorney  
Erickson & Wessman, P.A.  
1300 NE Godward Street, Suite 1600  
Minneapolis, MN 55413  
Direct: 612-436-1190  
Mobile: 952-239-8145  
Email: [crwessman@cericksonlaw.com](mailto:crwessman@cericksonlaw.com)  
Web: [www.cericksonlaw.com](http://www.cericksonlaw.com)

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**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Thursday, April 21, 2016 1:40 PM  
**To:** Ashley Miller  
**Subject:** Fwd: Interest 2015

These are business interest expenses I paid for 2015 that were not included (I believe) with the earlier materials I provided.

Sent from my iPhone

Begin forwarded message:

**From:** [Kathryn.Lein@usbank.com](mailto:Kathryn.Lein@usbank.com)  
**Date:** April 21, 2016 at 12:53:31 PM CDT  
**To:** [edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)  
**Cc:** [Jennifer.Ash@usbank.com](mailto:Jennifer.Ash@usbank.com)  
**Subject:** Interest 2015

Hi Ed -

Here is the interest paid in 2015 for all three loans.

x7589 - \$8,178.23  
x1572 - \$2,965.28  
x0398 - \$7,304.71

Thanks,

Katie

---

**Katie Lein**  
Wealth Management Specialist Associate | The Private Client Reserve  
p. 612.303.3102 | f. 612.303.3527 | [Kathryn.lein@usbank.com](mailto:Kathryn.lein@usbank.com)

**U.S. Bank**  
800 Nicollet Mall, Suite 1600 | Minneapolis, MN 55402

U.S. BANCORP made the following annotations

-----  
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**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Monday, May 16, 2016 3:11 PM  
**To:** Ashley Miller  
**Subject:** Fwd: K-1s  
**Attachments:** Ed K1 2015.pdf, ATT16360001.htm

Ashley,

I think this is the last piece of information you require.

Please let me know where we are at with wrapping up the process.

Best,  
Ed

Sent from my iPhone

Begin forwarded message:

**From:** Brian Rogers <[brian.rogers@evenhere.com](mailto:brian.rogers@evenhere.com)>  
**Date:** May 16, 2016 at 4:08:26 PM EDT  
**To:** Edward Adams <[edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)>  
**Subject: Re: K-1s**

Ed,

Here is your K1.

Brian

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Thursday, April 07, 2016 9:55 AM  
**To:** Ashley Miller  
**Subject:** Fwd: Yogurt Lab 2015 K1  
**Attachments:** 15P\_78329.05K1\_V1 13 ADAMS, EDWARD (1).pdf; ATT12494578.htm

Another K-1 for me...

Sent from my iPhone

Begin forwarded message:

**From:** Aaron Switz <[switzaaron@gmail.com](mailto:switzaaron@gmail.com)>  
**Date:** April 6, 2016 at 6:40:25 PM EDT  
**To:** Edward Adams <edwardsadams@yahoo.com>  
**Subject:** Yogurt Lab 2015 K1

Update will be coming soon.

**Aaron Switz (Zenith Holdings MSP LLC)**  
**Founder & CEO of Yogurt Lab , Agra Culture Kitchen & Press, & Sotarol**  
5007 France Ave S Suite 2 Minneapolis MN 55410  
612-227-8773 (cell)

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, April 12, 2016 9:27 AM  
**To:** Ashley Miller  
**Subject:** K-1 for E. Adams  
**Attachments:** K-1 Devenir.pdf

Ashley,

Attached is what I believe will be my final K-1.

Thanks.

Let me know our plan.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, April 05, 2016 3:16 PM  
**To:** Ashley Miller  
**Subject:** Re: Additional K-1s

With respect to SAR, I own 25% of the numbers set forth therein.

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**To:** Ashley Miller <amiller@murryllc.com>  
**Sent:** Tuesday, April 5, 2016 3:13 PM  
**Subject:** Additional K-1s

Ashley,

Attached are two additional K-1s. I am waiting on one more.

Ed



**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Monday, April 04, 2016 12:55 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In  
**Attachments:** WF Checking Expenses for 2015.csv; ECC Summary for 2015 Taxes.xls; AMEX Summary for 2015 Taxes.xls; AMEX DELTA Summary for 2015 Taxes.xls

Ashley,

Thanks for meeting today.

Attached are the spreadsheets you requested.

Best,  
Ed

---

**From:** Ashley Miller <amiller@murryllc.com>  
**To:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Thursday, December 3, 2015 2:12 PM  
**Subject:** RE: Checking In

Thanks Ed. Happy Holidays to you as well!

**Ashley Miller, CPA**

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Tuesday, December 01, 2015 6:24 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Thanks, Ashley.

I will revert.

Happy Holidays!

Sent from my iPhone

On Dec 1, 2015, at 4:29 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

I hope all is well and you were able to enjoy a nice Thanksgiving with your family. With the end of the year drawing near I thought it best to check to see if there was anything you cared to touch base on tax planning wise. The last we spoke you had mentioned that your accountant was nearing retirement and that you were considering transitioning to our firm for your future tax needs. If that is still the case, please do not hesitate to contact Pat or myself with any questions that make come up leading up to the new year.

Thanks and have a great day!

**Ashley Miller, CPA**

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

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**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, December 01, 2015 6:24 PM  
**To:** Ashley Miller  
**Subject:** Re: Checking In

Thanks, Ashley.

I will revert.

Happy Holidays!

Sent from my iPhone

On Dec 1, 2015, at 4:29 PM, Ashley Miller <[amiller@murryllc.com](mailto:amiller@murryllc.com)> wrote:

Hi Ed,

I hope all is well and you were able to enjoy a nice Thanksgiving with your family. With the end of the year drawing near I thought it best to check to see if there was anything you cared to touch base on tax planning wise. The last we spoke you had mentioned that your accountant was nearing retirement and that you were considering transitioning to our firm for your future tax needs. If that is still the case, please do not hesitate to contact Pat or myself with any questions that make come up leading up to the new year.

Thanks and have a great day!

***Ashley Miller, CPA***

Murry & Associates, LLC  
7575 Golden Valley, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453  
Website: [www.murryllc.com](http://www.murryllc.com)

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**Ariel Scott**

---

**From:** Patrick M. Murry  
**Sent:** Monday, October 27, 2014 3:29 PM  
**To:** 'edwardsadams@yahoo.com'  
**Subject:** FW: Amended Returns

Mr. Adams –

Would you be available tomorrow afternoon for phone call to discuss the amended returns that you need prepared?

I would be available for a call either at noon or anytime after 2:00. If tomorrow afternoon doesn't work, I would also be available Wednesday morning.

Let me know what might work for you.

Pat

**Patrick Murry**  
**Murry & Associates, LLC**  
[pmurry@murryllc.com](mailto:pmurry@murryllc.com)  
7575 Golden Valley Road, Suite 119  
Golden Valley, Minnesota 55427  
Direct: 763-535-7077  
Fax: 763-450-5451

**From:** Thomas Brever [<mailto:tbrever@fosterbrever.com>]  
**Sent:** Monday, October 27, 2014 2:26 PM  
**To:** Patrick M. Murry  
**Cc:** [edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)  
**Subject:** RE: Amended Returns

Please contact Ed directly to obtain the information. I will email you as much of the information as I presently possess.

**From:** Patrick M. Murry [<mailto:pmurry@murryllc.com>]  
**Sent:** Monday, October 27, 2014 2:03 PM  
**To:** Thomas Brever  
**Cc:** [edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)  
**Subject:** RE: Amended Returns

Tom –

We would be happy to prepare any amended returns that are required. If we can get all of the necessary information (the original returns and the information on the omitted income) we can get right on preparing the returns.

Please let me know if you would like me to work through you or to contact Mr. Adams directly for the information.

Pat

**Patrick Murry**  
**Murry & Associates, LLC**  
[pmurry@murryllc.com](mailto:pmurry@murryllc.com)

7575 Golden Valley Road, Suite 119  
Golden Valley, Minnesota 55427  
Direct: 763-535-7077  
Fax: 763-450-5451

---

**From:** Thomas Brever [<mailto:tbrever@fosterbrever.com>]  
**Sent:** Monday, October 27, 2014 1:21 PM  
**To:** Patrick M. Murry  
**Cc:** [edwardsadams@yahoo.com](mailto:edwardsadams@yahoo.com)  
**Subject:** Amended Returns

Pat,

I would like to engage you and your firm to prepare amended Forms 1040X for Ed Adams under a Kovel arrangement, whereby your firm acts as my assistant in rendering legal advice. Ed is a professor of law at the U of M Law School. Some income arising from an entity was mistakenly omitted from a return and we wish to amend and voluntarily disclose the amounts. Please let me know whether you would be willing to assist.

**Circular 230 Notice:** *In accordance with Treasury Regulations related to practice before the Internal Revenue Service, please note that any tax advice contained in this message (including attachments) is not intended to be used, and cannot be used, for purposes of (i) avoiding penalties imposed under the United States Internal Revenue Code or (ii) promoting, marketing or recommending to another person any tax-related matter.*

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**Ariel Scott**

---

**From:** Patrick M. Murry  
**Sent:** Tuesday, May 31, 2016 10:00 AM  
**To:** 'Edward Adams'  
**Subject:** RE: Meeting Today

Hi Ed –

2:00 doesn't work but we could do 3:00. Let me know if that works.

Pat

**Patrick Murry**  
**Murry & Associates, LLC**  
[pmurry@murryllc.com](mailto:pmurry@murryllc.com)  
7575 Golden Valley Road, Suite 119  
Golden Valley, Minnesota 55427  
Direct: 763-535-7077  
Fax: 763-450-5451

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Tuesday, May 31, 2016 9:29 AM  
**To:** Patrick M. Murry  
**Subject:** Meeting Today

Pat,

My wife had a little accident over the weekend and I need to be with her during a visit to the Dr. Can we meet at 2:00 today?

Ed

**Ariel Scott**

---

**From:** Patrick M. Murry  
**Sent:** Wednesday, November 12, 2014 12:05 PM  
**To:** 'Edward Adams'  
**Subject:** RE: Tax Returns

Ed –

I spoke with Tom around 11:40 and he was going to call to discuss an issues with you. One that issue is resolved we can complete the returns.

Assuming that you and Tom touch base – 1:00 today will not work as we still need to make any adjustments that may come out of that conversation.

Assuming we have a final answer early this afternoon we can get them completed and available for you to sign today.

**Patrick Murry**  
**Murry & Associates, LLC**  
[pmurry@murryllc.com](mailto:pmurry@murryllc.com)  
7575 Golden Valley Road, Suite 119  
Golden Valley, Minnesota 55427  
Direct: 763-535-7077  
Fax: 763-450-5451

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Wednesday, November 12, 2014 10:29 AM  
**To:** Patrick M. Murry; [tbrever@fosterbrever.com](mailto:tbrever@fosterbrever.com)  
**Subject:** Tax Returns

Gentlemen,

My wife and I are available to do this today and then I am gone for several days. I want to get this done today, as does she. Can we meet with Pat in his office at 1:00?

Ed

**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Sunday, November 09, 2014 7:01 PM  
**To:** Patrick M. Murry  
**Subject:** FW: 2009 Taxes  
**Attachments:** 2009 Adams E Form 1040 Individual Tax Return.pdf; DLA Tax Return Stock Trades (2009).xls; ESA Tax Return Stock Trades (2009).xls

Pat,

I pulled up the originals that Ed sent us and there is no differences in attachments he sent to me yesterday. Has there been any response from the draft you sent Tom on Friday? Please let me know if you need me to do anything prior to our meeting on Tuesday. I'll be sure to check my email throughout the day tomorrow while at class and please let me know if there is anything I need to do tomorrow night. I think Brad should be able to drop off on Tuesday so I can get in in plenty of time before our meeting.

Ashley Miller, CPA  
Murry & Associates, LLC  
7575 Golden Valley Road, Suite 119  
Golden Valley, MN 55427  
[amiller@murryllc.com](mailto:amiller@murryllc.com)  
Phone: (763) 450-5443  
Fax: (763) 450-5453

**\*\*Please note my email address, phone and fax numbers have changed\*\***

-----Original Message-----

**From:** Edward Adams [<mailto:edwardsadams@yahoo.com>]  
**Sent:** Sat 11/8/2014 12:44 PM  
**To:** Ashley Miller  
**Subject:** 2009 Taxes

Ashley,

Please review the attached and let's discuss.

Ed



**Ariel Scott**

---

**From:** Ashley Miller  
**Sent:** Sunday, November 09, 2014 6:54 PM  
**To:** Patrick M. Murry  
**Subject:** FW: 2009 Taxes  
**Attachments:** 2009 Adams E Form 1040 Individual Tax Return.pdf; DLA Tax Return Stock Trades (2009).xls; ESA Tax Return Stock Trades (2009).xls

Pat,

I pulled up the originals that Ed sent us and there is no differences in attachments he sent to me yesterday. Has there been any response from the draft you sent Tom on Friday? Please let me know if you need me to do anything prior to our meeting on Tuesday. I'll be sure to check my email throughout the day tomorrow while at class and please let me know if there is anything I need to do tomorrow night. I think Brad should be able to drop off on Tuesday so I can get in in plenty of time before our meeting.

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**\*\*Please note my email address, phone and fax numbers have changed\*\***

-----Original Message-----

From: Edward Adams [<mailto:edwardsadams@yahoo.com>]  
Sent: Sat 11/8/2014 12:44 PM  
To: Ashley Miller  
Subject: 2009 Taxes

Ashley,

Please review the attached and let's discuss.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Monday, November 10, 2014 6:59 AM  
**To:** Patrick M. Murry  
**Subject:** Fw: 2009 Taxes  
**Attachments:** 2009 Adams E Form 1040 Individual Tax Return.pdf; DLA Tax Return Stock Trades (2009).xls; ESA Tax Return Stock Trades (2009).xls

Pat,

I think this will help to explain the earlier confusion on the 2009 return. I will call you around 8:30 this morning. Thanks.

----- Forwarded Message -----

**From:** Edward Adams <edwardsadams@yahoo.com>  
**To:** "amiller@murryllc.com" <amiller@murryllc.com>  
**Sent:** Saturday, November 8, 2014 12:44 PM  
**Subject:** 2009 Taxes

Ashley,

Please review the attached and let's discuss.

Ed

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Tuesday, May 31, 2016 9:29 AM  
**To:** Patrick M. Murry  
**Subject:** Meeting Today

Pat,

My wife had a little accident over the weekend and I need to be with her during a visit to the Dr. Can we meet at 2:00 today?

Ed

**Ariel Scott**

---

**From:** Thomas Brever <tbrever@fosterbrever.com>  
**Sent:** Wednesday, November 12, 2014 11:40 AM  
**To:** edwardsadams@yahoo.com; Patrick M. Murry  
**Subject:** Signing Returns

Ed,

Pat has prepared the amended returns based on the documents and information provided. They can be signed by you and your wife. I have sent a disclosure statement to Pat for comment. This can be added to the returns for filing.

Tom

**Ariel Scott**

---

**From:** Edward Adams <edwardsadams@yahoo.com>  
**Sent:** Wednesday, April 27, 2016 11:52 AM  
**To:** Ashley Miller; Patrick M. Murry  
**Subject:** Tax Returns

Ashley/Pat,

Where are we at? Any progress?

Ed